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## **Making Government Better:**

### **A Process Improvement Study of The Materials Management Office State Procurement Section**

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**Georgia Gillens, CPPB  
Procurement Manager  
Materials Management Office  
CPM Class of 2005**

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In considering a project for completion of my Certified Public Manager requirement, I had to look no farther than the daily process of the Materials Management Office (MMO) State Procurement Section. As a member of a buying staff that had experienced its share of transition, even in the short 1+ year I had been with MMO, it became increasingly evident that the workflow process had to be examined.

In 1993 the Materials Management Office, State Procurement Division, operated with a staff of nineteen. In the year 2000, the staff dwindled to thirteen FTEs. Today, the State Procurement Office operates with a staff of seven buyers. These staffing issues, along with response time in implementing contracts, were significant reasons why the workflow process warranted reviewing.

The State Procurement Office (SPO) is responsible for implementing statewide term, fixed price, multi-state cooperatives, and all purchases over state agency certification levels for the State of South Carolina. While continuing to lose staff through attrition, budget cuts, and turnover, it appeared that no real or lasting effort had been made to "change the way business was being done" in the State Procurement Office. Due in large part to staffing issues and workload, there was no time to stop and review the process currently in place. Although uncertain of the outcome, or how I would manage to find time to study the process, I realized that this was a mission that had to be performed.

The State Procurement Office was still attempting in 2004-2005, to do business much the same as it had always been done. However, ever mounting workloads and transitioning staff dictated that changes to the work process had to be considered. **Key factors that required consideration:**

- Agency needs and turn around times had become a significant problem. Average processing time for an Invitation to Bid in 2002 was 47.3 days; in 2004, the average number of days rose to 58. Requests for Proposal processing time in 2002 averaged 77.6 days; in 2004, the number of days had jumped to 109.6.
- Many state agencies were only certified up to \$5,000 with all other agency purchases being handled by the SPO.
- Agency level buying staff was also beginning to transition.
- SPO had lost a cumulative 100+ years of experience within a 2 year period.
- SPO's Standard Operating Procedures needed some tweaking to continue meeting needs with ever dwindling resources.

After conversations with SPO buying staff, reviewing the standard operating procedures of the State Procurement Office, and feedback from various agency specific sessions in Fall 2003, Spring 2004, and Fall 2004, it was determined that the time had come to address the process utilized by the State Procurement Office in issuing solicitations and implementing contracts. **(See Attachments A, B & C)**

My hypothesis was to look at the process of the Materials Management office, specifically, the State Procurement Office, to evaluate the current workflow of a requisition becoming a contract to see if efficiencies could be identified in the process. I initially believed that there were key areas that could be streamlined or automated to assist the buying staff in getting a better handle on SPO's core mission of saving taxpayer dollars through implementing a number of statewide term contracts. I was unsure, however, if this hypothesis would be substantiated by facts.

Despite being a working member of the State Procurement Office, reviewing the workflow process was still a daunting task. I began by reviewing processing times over the last three years (2002-2004). On average, it took about 72.28 days for MMO to process a requisition into an award/contract.

### **SOLICITATION PROCESSING TIMES (2002-2004)**

Calendar Year	BVB	Fixed Price Bid	IFB	Request for Quotation	RFP	Avg. Days To Award
2002	84.5	76.7	47.3	14.0	77.6	60.02
2003	119.4	80.1	57.4	24.1	87.4	73.68
2004	102.5	62.5	58.0	N/A	109.6	83.15
3 Yr. Average # of Days to Award	102.133	73.1	54.23	19.05	91.53	72.28

A number of factors, both internally and externally, contribute to the amount of days in the process. Before a requisition hits our door, the agency has to exhaust its own internal procurement process prior to submitting a requisition to the Materials Management Office. Once the process has run its course at the agency level, the requisition is sent to the Materials Management Office for processing.

### **How a Requisition Becomes A Contract:**

#### **The Requisition Process:**

- Requisition is submitted by the agency.
- Mail is picked up by Internal Operations staff and distributed to MMO mailroom personnel.

- Mailroom personnel date stamps and distributes to MMO support personnel for keying into the Automated Procurement System (APS).
- Support personnel distributes to the inbox of the State Procurement Officer.
- State Procurement Officer reviews and assigns to the appropriate buyer.
- Buyer receives requisition in inbox, reviews statement of work/specifications, and works into schedule.

**The Solicitation Process:**

- Buyer builds solicitation (all historical pricing and market research is performed at this stage).
- Draft solicitation is sent to the agency for approval prior to issuing to the public.
- Agency returns draft (with or without corrections) to MMO buyer.
- If there are corrections, the MMO buyer may return another draft to the agency for review.
- If no corrections, solicitation is issued and an advertisement is placed in South Carolina Business Opportunities (SCBO) as a requirement of law.
- Solicitation usually stays on the street for an average of 35 days.
- A Pre-Bid or Pre-Proposal Conference is usually held sometime during this timeframe. A Q&A period is also factored into this time. All things running smoothly, there is usually no need for an extension to the opening date.
- If there is no pre-bid or pre-proposal conference, the MMO buyer waits for the Q&A period to expire.

- Once all questions are received from the Q&A period, these questions are forwarded to the agency for answers which will be issued to all potential bidders in the form of a written amendment. If the process works smoothly and all parties respond in a timely manner, original dates can be adhered to. However, if the questions are not responded to promptly, an amendment may be issued to extend the opening date and time. A second amendment will then be issued with answers to all questions.
- Once the final amendment has been issued, the MMO buyer awaits the bid opening.
- Bid openings are conducted by MMO bid clerks/mailroom staff. These individuals conduct the public bid opening and key in pricing info if the solicitation is an Invitation for Bid. If the solicitation is a Best Value Bid or an RFP, the only information keyed into the bid tabulation form is the bidder's name since price cannot be divulged as it is usually an award criterion which will be evaluated by an independent evaluation panel.
- Bid clerk/mailroom staff delivers all responses along with bid tab to appropriate buyer.

**The Award & Evaluation Process:**

- The MMO buyer applies all preferences requested by the bidder as mandated by law at this time.
- All responses are then reviewed to ensure responsiveness and responsibility.  
(Responsiveness deals with whether or not the vendor submitted all that was

required in the bid (barring those items that the SC Consolidated Procurement Code deems curable). Responsibility deals with whether or not the vendor can perform the required services or deliver the needed goods. A responsibility check may include a request for financials, history with contracts of similar size and scope, references, etc.).

- If a bidder is deemed non-responsive or non-responsible, the MMO buyer provides written documentation for the file.
- Once the appropriate checks have been performed (a process that can add an additional couple of weeks), the MMO buyer sends the responsive and responsible bidders to the agency for review.
- Once responses are received back from the agency, the MMO buyer makes an award to the lowest responsive and responsible bidder (Invitation for Bids).
- If the solicitation in question is not an Invitation for Bid (IFB), but a Best Value Bid (BVB) or a Request for Proposal (RFP), the MMO buyer will perform the same responsiveness and responsibility checks.
- A pre-determined independent evaluation committee is then brought on board and a meeting is scheduled to brief the panel on the evaluation process. Each panel member will receive one score sheet for each proposal, written panel briefing instructions, and a confidentiality form.
- In accordance with The Code, a public notice of the meeting is posted at the Materials Management Office.



- Another date is set with this panel for selection of a contractor/awardee. A notice of this meeting is also posted publicly at the MMO office.
- The MMO buyer writes an official award determination for the file and an Intent to Award or Statement of Award is issued. If more than one response is received and the dollar amount dictates, and Intent to Award is issued. (This intent is a 16 day period that allows bidders who may be aggrieved to protest the award.) If no protest is received by the 15<sup>th</sup> day, the intent becomes the award/contract at the end of 16 days.

#### **The Protest Process:**

- All protests must be submitted in writing by the "aggrieved" party(ies) spelling out clearly the areas where the protestant believes he has a grievance. If a protest is received, the Chief Procurement Officer (also the hearing officer) forwards a copy of the protest to the appropriate parties.
- The MMO buyer now issues a "Suspension of Award".
- If the issue(s) in the protest letter fall within certain areas of The Code, the MMO can issue a decision without the benefit of a hearing.
- If this is not the case, the MMO buyer and the SPO usually attempt to contact the protestant to offer clarity on why the award should stand. If this process is successful, the protestant is asked to officially (in writing) withdraw the protest.
- Once withdrawal is received, the MMO buyer issues a "Reinstatement of award."

- If the MMO buyer and the SPO are unsuccessful in providing clarity to the protestant, a hearing is scheduled by then Materials Management Officer. It may take anywhere in the neighborhood of about 30 days for the hearing to take place.
- At the hearing both sides – protestant and intended awardee may present a case. The State (MMO buyer and SPO) is also allowed to present.
- The CPO has 10 days to render and post a decision. Decisions are posted on the MMO website and at MMOs physical location on the 10<sup>th</sup> day.
- The CPO's decision can be appealed by either party to the Procurement Review Panel.
- The parties have 10 days to file an appeal with the Procurement Review Panel. If no appeal is received, the MMO buyer would either issue a "Reinstatement of Award" or "Cancellation of Award."
- If an appeal is received, a hearing is scheduled, the parties are notified, and the Panel hears all interested parties (the protestant, the intended awardee, and the CPO).
- The Panel will render judgment and post a decision. All parties are notified in writing and the decision is posted the MMOs website.
- Interested parties may appeal Panel Decisions to the **SC Court of Appeals**.

It has been an exhaustive process to study State Procurement's current workflow to determine if efficiencies could be identified. Ideally, the Materials Management Office and the State of SC could benefit from an automated process that begins with an agency creating a requisition that leads to solicitation and final contract award by the MMO buyer.

My ideal vision would rely on technology and ecommerce features to allow electronic submission of requisitions with approvals and tracking at each stage of the process. Each state agency could then track its own internal process and approvals before requisitions are even received at the MMO level. Once at MMO, an agency would have a unique password that would allow view only capabilities to check on the status of submitted requisitions.

After meeting with staff from the CIO's office, however, it was determined that this would be a venture. And, as the State is currently looking at a statewide accounting package that includes a procurement module, this idea maybe fiscally unrealistic.

I have, therefore, chosen to look at each of the four stages of the current process to see where, or if, efficiencies could be identified and implemented when feasible.

#### **Findings:**

- The State Procurement Office must clearly prioritize the areas where it adds value. Once identified, we must focus our resources on those areas in order to provide agencies and the citizens of South Carolina with the most efficient and fair way of procuring goods and services. MMO buyers add value by implementing statewide term contracts (utilized by state agencies, school districts, local governments and municipalities); soliciting multi-state and multi-agency contacts; and MMO buyers add value by soliciting large multi-term contracts. Ultimately MMO buyers also add value by serving as consultants to individual state agencies.
- SPO should identify areas of efficiency, including electronic submission of agency requisition and forms, already implemented by the CIO Office of IT Procurement to

determine if any of those areas can be implemented at MMO. (See Attachment D -  
- **Electronic Requisitioning.**)

- SPO should continue to provide opportunities for on-going training to individual state agencies to ensure qualified staff that can perform more responsible procurements, thus allowing more agencies to raise its certification level. This would allow MMO buyers time to focus on complex procurements such as statewide terms, multi-state cooperatives and professional services.

**Possible areas for short-term implementation include:**

- **Creating a vehicle to provide for electronic submission of all requisitions and pertinent forms to MMO for processing.** System could mirror or be modeled after that currently utilized by the CIO's office. See the following website:  
[https://www.myscgov.com/cgi/hsrun/Distributed4/SCSGRequisition/StateId/CKkwBJg\\_oeUxl2vec - PTJ4hZYyWA-3h1b/HAHTpage/SCSGRequisition.HsMain\\_Frame.run \)](https://www.myscgov.com/cgi/hsrun/Distributed4/SCSGRequisition/StateId/CKkwBJg_oeUxl2vec_PtJ4hZYyWA-3h1b/HAHTpage/SCSGRequisition.HsMain_Frame.run)
- **With the input of SPO buyers, establishing a checklist for the stages of the Procurement Process** (See Attachment E). Support staff would no longer key in requisitions that did not have all the required documentation. If a requisition is submitted without the proper documentation, the requisition along with a standard form highlighting deficiencies would be sent back to the agency. (See Attachment F). This prohibits the requisition form making it all the way to the buyer only to be placed on hold. Instituting this step could go a long way in building better rapport with individual agencies. The agency could then be assured that once a document

reaches the buyer's inbox, it has a better chance of being processed in a timely manner rather than stalling at this stage due to missing components.

- **Requiring electronic submission of proposals**. Buyers currently receive boxes of proposals in response to a solicitation. If electronic submission were allowed, the MMO buyer (who also has space issues to be concerned about) would be able to receive one original hard copy with all other copies being submitted via CD or diskette. RFPs have been identified as the first stage in this process as many of the players in the IFB and BVB arena also have technology considerations. The goal is to eventually provide for electronic submission of all solicitation types.
- **Posting bid tabs electronically**. (See Attachments G & H). Currently MMO buyers and bid clerks are receiving a number of calls from vendors regarding bid results. We could see a significant drop in these particular calls by posting bid results on the website. The vendor community would be notified via SCBO of this change and the buyer would be able to focus attention on other areas of the solicitation process. Since it is not mandated that vendors attend the bid opening, we looked at ways to provide the information to the vendor without tying up the time of the buyer or the bid clerk. (As stated in the Code RFP bid tabs would be posted after award)
- **Bid responses, where appropriate, would be scanned into an identifying folder** for submission to agencies. The buyer would include all responsive and responsible bidders along with bid tabs where preferences have been applied. Currently, buyers send responsive and responsible responses to the agency via

IMS or by US Postal Service where applicable. Agencies have on average about 10 days to get a response back to the MMO buyer. (See Attachment H). By scanning the responses, the MMO buyer is able to utilize email for faster distribution.

- **Incorporating responsibility checks into the solicitation** – At present, MMO buyers perform responsibility checks after responses to the solicitations are received from bidders. If implemented, MMO buyers would utilize the qualifications section of the MMO solicitation to ask for this information as part of the bid response. Requesting this information upfront would cut significant time from the process. In the current scheme, a vendor may be given anywhere from 7-14 additional days to provide information requested in a responsibility letter (See Attachment I).
- **Creation of electronic folders for each solicitation**. Each electronic folder would include subfolders for each stage of the procurement process. This step will aid significantly in reducing response time for FOIA requests and provide for easier viewing, retrieval and transmission of information from the solicitation file. Documents would be included as stipulated by the checklist, thereby creating a more efficient system. Time would no longer be wasted thumbing through entire contract files or boxes when each stage of the process could be accessed through the creation of subfolders.
- **Empowering agency contract amendment authorizations** – MMO buyers spend a great deal of time wearing the contract administration hat. A document has been

created by the CIOs office that allows agencies to approve contract changes within a certain dollar amount. These changes could be completed at the agency level and ultimately forwarded to MMO for signature authority and for inclusion in the contract file.

- **Updating MMO forms into more user friendly documents for agency submission.** Presently the majority of state agencies utilize the State Requisition Form for submission to MMO. This form does not currently exist on the MMO website and the forms that do were not created in forms mode. All forms would now be created utilizing forms mode so that agencies can submit along with its requisitions. (See Attachment J)

In conclusion, all of these "efficiencies" will cost time and money. However, in order to ensure the long term health of the MMO buying staff while still meeting the goals of effective, efficient, and fair procurement in the State of South Carolina, we must look at implementing these efficiencies as soon as possible. Technology is a tool we can use to provide quicker responses to our customer base. Freeing up some of the MMO buyer's valuable time through the use of technology would allow more time for market research, examining historical buying of commodities and services, and most importantly, time to consult with agencies on individual procurements. SPO buyers would also be able to spend time gathering information on what's being done in other states in an effort to get better products at the best price for customers. Agencies rely on the MMO buyer to serve as a clearinghouse of information, a task that has been hard to provide in the last couple of years. With the realization of these efficiencies, MMO buyers would be able to lend more

hands-on assistance to agency buyers in the field to get them up to speed in otherwise uncharted areas.

Examining the workflow process of State Procurement is merely one component in a long-range plan. The MMO must look at what services we currently provide, staffing levels and resources required to provide those services and how we might add to or shift resources to identify our core mission.

I initially believed that efficiencies could be identified in the workflow process. While this is still true, it is not the only issue. We must realize that the health or wellness of one area has a direct impact on all the others. We can always find ways to shave time from the process and will continue to pursue those avenues. However, a very real task remains – deciding where we all go from here with the resources we now have at hand. The State Procurement Office can continue to operate by spending its time working on all the requisitions it receives from agencies. Or, MMO buyers can spend time focusing on value added services such as statewide terms, cooperative agreements, and professional services that really meet the larger needs of our customers. I believe that my initial premise is correct, but for real lasting change, we may need to redistribute our resources and partner with agencies that have a proven track record of creating efficiencies. The MMO State Procurement Office can, however, make a start towards creating efficiencies by looking at the proposed schedule of implementation and aggressively pursuing those efficiencies that can be realized in the short term.



### Implementation Schedule for Proposed Efficiencies and Possible Time Saved:

<u>Proposed Efficiency</u>	<u>Possible Time Saved</u>	<u>Status</u>
Electronic Submission of Requisitions	3 days	Currently reviewing system established by CIO staff
Checklist of Procurement Process	4 days	Completed. Awaiting approval to implement
Deficiency Letter (which can be submitted to agency electronically)	4 days	Sample designed – pending approval.
Electronic Submission of RFPs	May not realize great time savings, but would create efficiency with storage, transporting and space concerns.	Awaiting approval.
Bid Tabs Posted Electronically	4-5 days	Awaiting approval.
Bid Responses Scanned Into Identifying Folders	4 days	Limited implementation already.
Responsibility Checks Built Into Qualifications Section of Solicitation	1 week	Pending approval.
Agency Contract Amendment Authorization	Time saved would be on the back end of the award. Granting agencies contract amendment authorization allows MMO buyer more time to focus on solicitations.	
MMO Forms (update to forms made for electronic submission)	3-4 days.	Awaiting approval.

## **References:**

The State of South Carolina Executive Budget, pg. 69.

The Information Technology Management Office website: <http://cio.state.sc.us/itmo/main.htm>

The Materials Management Office, State Procurement Section Standard Operating Procedures.

The South Carolina Consolidated Procurement Code.

The Budget and Control Board Procurement Regulations.

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 DIVISION DIRECTOR  
 (803) 734-2320

MATERIALS MANAGEMENT OFFICE  
 1201 MAIN STREET, SUITE 600  
 COLUMBIA, SOUTH CAROLINA 29201  
 (803) 737-0600  
 Fax (803) 737-0639

R. VOIGHT SHEALY  
 MATERIALS MANAGEMENT OFFICER

## Memorandum

TO: State Procurement Directors  
 State Agency Deputy Directors  
 College & University Vice Presidents

FROM: Voight Shealy  
 State Materials Management Officer

SUBJECT: October 4, 2004 Meeting Regarding Procurement Certification

DATE: October 6, 2004

On October 4, 2004, the Budget and Control Board, Procurement Services Division, initiated an open discussion concerning the future of procurement certification in order to seek input from you and your peers. Sixty two people attended the meeting and contributed significantly in this discussion. I am writing to provide you with a recap of the topics discussed and the topics that received the most support. For your information, I have attached the PowerPoint presentation used to facilitate our discussion.

### Topics Discussed

During the meeting, we discussed the following topics which include a number of audience initiated ideas to improve the agency procurement certification process.

- Increasing all agencies procurement certification above the \$25,000 currently authorized all agencies
- Increasing certified agencies' procurement certification
- Targeting more specifically agency procurement expertise in certifications
- Certifying individuals who possess personal procurement certifications and/or professional experience
- Certifying for the specific procurement procedures authorized by the Code, i.e. invitations for bids, requests for proposals, etc.
- The chief procurement officers continuing to delegate procurement authority to agencies on a transaction by transaction basis

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October 6, 2004

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- Certifying more liberally for commodities than services
- Adding a special certification category for Homeland Security products and services
- Increasing procurement certification for select agencies desiring an increase
- Standardizing and distributing solicitation documents including terms and conditions for select procurements and delegating additional certification to agencies utilizing those standardized documents

### Most Popular Topics Discussed

The ideas receiving the most support from the discussion group included:

- Targeting more specifically agency procurement expertise in certifications
- Certifying for the specific procurement procedures authorized by the Code, i.e. invitations for bids, requests for proposals, etc.
- The chief procurement officers continuing to delegate procurement authority to agencies on a transaction by transaction basis
- Certifying more liberally for commodities than services
- Adding a special certification category for Homeland Security products and services
- Increasing procurement certification for select agencies that possess professional procurement staffs and demonstrate procurement expertise and desire more authority
- Standardizing and distributing solicitation documents and terms and conditions for select procurements and delegating additional certification to agencies utilizing those standardized documents

We are proceeding with plans to develop these most promising ideas for submission to the Budget and Control Board. Finally, we plan to survey agency directors seeking their opinions on increasing select agency certifications immediately.

As we develop ideas to improve the agency procurement certification process, I will continue to keep you informed of our progress and seek your advice on these and other topics as they arise.

I request your continued support for this project, and thank you for your participation.

C: Marshall Evans, Governor's Office  
 Diane Caraway, Senate Finance Committee  
 Don Hottel, Ways and Means Committee  
 Nat Kaminski, Comptroller General's Office  
 Frank Rainwater, State Treasurer's Office  
 Delbert Singleton, Director, Procurement Services Division  
 Chief Procurement Officers  
 Keith McCook, Assistant General Counsel  
 Larry Sorrell, Manager, Audit and Certification

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**MATERIALS MANAGEMENT OFFICE  
SURVEY OF STATE PROCUREMENT DIRECTORS  
SUBJECT: AGENCY PROCUREMENT CERTIFICATION  
SURVEY RESULTS  
JUNE 2003**

1. Should the Budget and Control Board increase the baseline procurement certification of all non-certified agencies from \$5,000? (Please check one.)

Yes 35  
No 1

2. If you answered yes to question number 1, what new baseline procurement certification should be granted? (Please check one.)

\$10,000 6  
\$25,000 22  
\$50,000 7

3. For future certifications, should we redefine certification to mean the initial commitment of a contract, or the annual expenditure of a contract, instead of the total potential commitment for all years of a contract combined?

Yes 32  
If yes, please check one.  
Initial commitment period 8  
Annual expenditure amount 24  
Other recommendations 0  
No 1

4. Should certifications be customized more to recognize agency expertise and higher certification granted in those selected commodity areas? (Please check one.)

Yes 23  
No 9

5. Please provide other comments as desired. See attached pages for comments rec'd

Please visit our website at [www.state.sc.us/mmo/mmo](http://www.state.sc.us/mmo/mmo)

## FY 2005-06 Executive Budget

### Department of Administration

#### From the Budget and Control Board and the Governor's Office:

1. Office of General Services – Our state owns over 8,000 buildings comprising 60 million square feet of space with no central authority to make management decisions. Tens or even hundreds of thousands of square feet of state-owned office space sits vacant, yet the state leases hundreds of thousands more square feet of office space from the private sector.
2. Office of Human Resources – Not having any one person in charge or responsible can allow for the perpetuation of programs that need fixing or ending. The Teacher and Employee Retention Incentive Program was created to retain our best teachers, but instead has resulted in the possibility of double or even triple leave payouts and has increased the unfunded liability of our state retirement system by over \$100 million. Our state has a generous retirement system that has run up \$4.2 billion in unfunded debt that is growing and must be addressed.
3. Employee Insurance Program.
4. Energy Office.
5. Division of Procurement Services – Our state's antiquated procurement system, currently overseen by the Budget and Control Board, sometimes serves as a roadblock that unnecessarily slows down time sensitive projects. For instance, the Department of Parks, Recreation and Tourism recently engaged the procurement system to assist them in outsourcing the state's bait and tackle shops. What should have been a simple procurement matter was delayed, thereby preventing PRT from outsourcing these shops within a reasonable timeframe.
6. Division of Internal Audit and Performance Review.
7. Research and Statistics (excluding Digital Cartography and Precinct Demographics) – Digital Cartography and Precinct Demographics are related to redistricting after the Decennial Census, which is largely a legislative branch function.
8. One-half of the Executive Director's office.
9. One-half of the Internal Operations office.
10. Governor's Office of Executive Policy and Programs (excluding Guardian ad Litem Office, Continuum of Care, and the State Ombudsman).

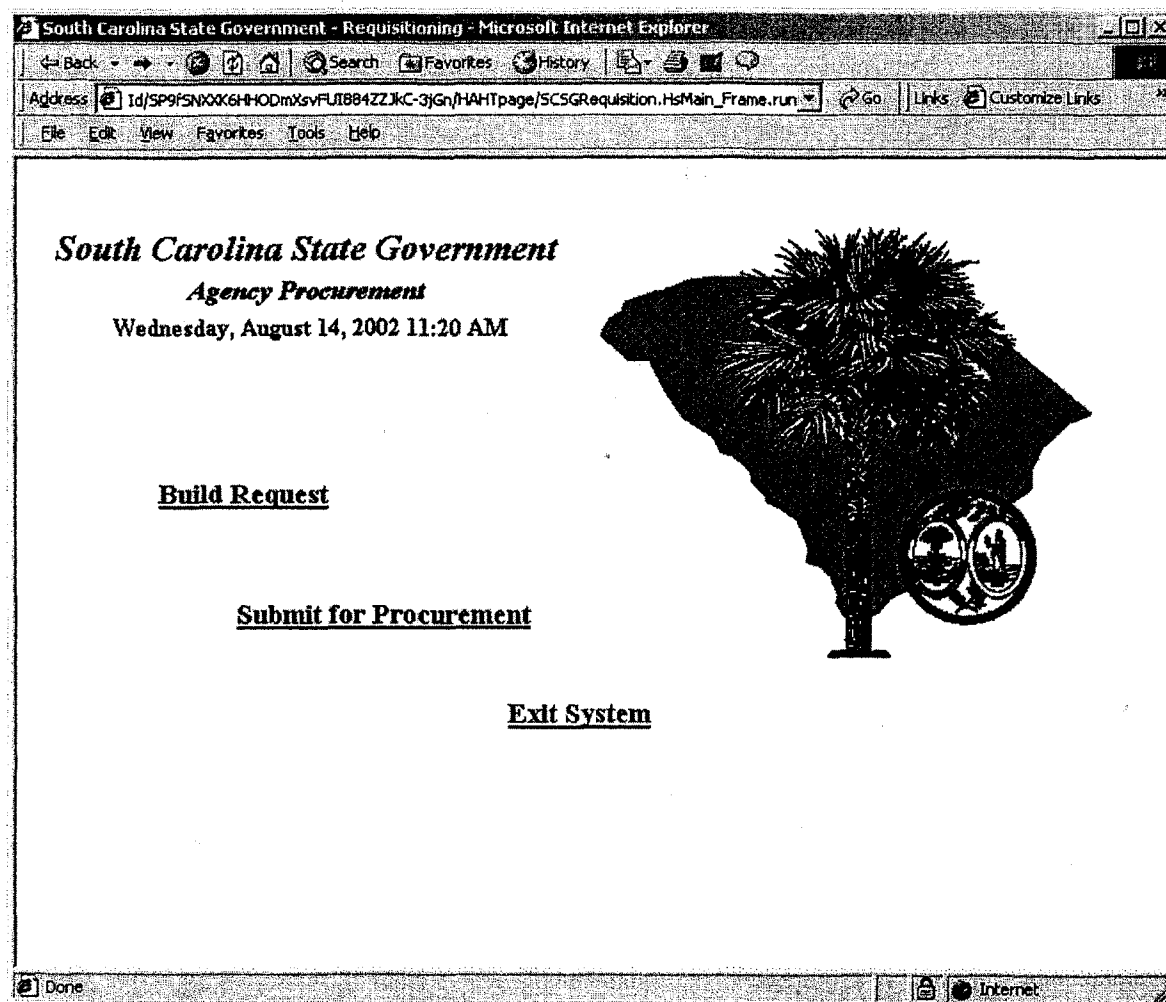
By moving the above-listed central administrative functions to the governor's cabinet, the Budget and Control Board could then focus on key areas of state fiscal policy, specifically by:

1. Approving state revenue and expenditure projections.
2. Authorizing the issuance of bonds.
3. Addressing budgetary shortfalls.
4. Administering the State Retirement System.

**FIX THE STRUCTURE**

**60**

<http://www.myscgov.com/Requisition.html>



## CHECKLIST FOR EACH STAGE OF THE PROCUREMENT PROCESS

<u>REQUISITION STAGE</u>	<u>SOLICITATION STAGE</u>	<u>EVALUATION STAGE</u>	<u>AWARD STAGE</u>	<u>PROTEST STAGE</u>
<input type="checkbox"/> Requisition <input type="checkbox"/> Estimated Cost & Total Cost <input type="checkbox"/> Proper Signatures <input type="checkbox"/> Detailed Specifications Submitted Electronically <input type="checkbox"/> Justification Prior to Use of a Multi-term Contract (11-35-2030 (2) and 19-445-2135 D (1) (2)) <input type="checkbox"/> Suggested Contract Dates <input type="checkbox"/> Justification for Competitive Sealed Proposal (RFP) (11-35-1530 (1)) <input type="checkbox"/> Justification for Competitive Best Value Bid (BVB) (11-35-1528 (1)) <input type="checkbox"/> Justification for Fixed Priced Bid (11-35-1525 (1)) <input type="checkbox"/> Suggested Vendor List <input type="checkbox"/> Agency Buyer and Contact Information	<input type="checkbox"/> Solicitation in Final Form <input type="checkbox"/> SCBO Advertisement <input type="checkbox"/> Q& A, Pre-Proposal or Pre-Bid Changes <input type="checkbox"/> Public Attendance Roster <input type="checkbox"/> Amendment(s)	<input type="checkbox"/> Written Clarifications by Any Vendor <input type="checkbox"/> Correspondence to Offerors Regarding Oral Presentations <input type="checkbox"/> Conflict of Interest, Confidentiality Certification <input type="checkbox"/> Blank Evaluator Report (Score Sheet) <input type="checkbox"/> Panel Member/Evaluator Score Sheets <input type="checkbox"/> Summary(Composite) of Evaluation Scores <input type="checkbox"/> Preference Calculations <input type="checkbox"/> Determination and Findings Form <input type="checkbox"/> Determination of Non-Responsiveness <input type="checkbox"/> Responsibility Letter (if needed) <input type="checkbox"/> Negotiations <input type="checkbox"/> Cost Calculations Utilizing Mathematical Formula	<input type="checkbox"/> Bid Tab <input type="checkbox"/> Vendor Responses to Solicitation <input type="checkbox"/> Determination of Non-Responsibility <input type="checkbox"/> Response to Responsibility Check <input type="checkbox"/> Intent or Statement of Award	<input type="checkbox"/> Letter(s) of Protest <input type="checkbox"/> Suspension Notice of Award <input type="checkbox"/> CPO's Letter of Hearing to Interested Parties <input type="checkbox"/> CPO's Decision <input type="checkbox"/> Protest Withdrawal Letter <input type="checkbox"/> Copy of Appeal of CPO decision <input type="checkbox"/> Hearing Notice – Procurement Review Panel <input type="checkbox"/> Panel Decision <input type="checkbox"/> Appeal of Panel Decision <input type="checkbox"/> Reinstatement Notice <input type="checkbox"/> Cancellation of Award



**STATE OF SOUTH CAROLINA  
State Budget and Control Board  
PROCUREMENT SERVICES DIVISION**

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DIVISION DIRECTOR  
(803) 734-2320

MATERIALS MANAGEMENT OFFICE  
1201 MAIN STREET, SUITE 600  
COLUMBIA, SOUTH CAROLINA 29201  
(803) 737-0600  
Fax (803) 737-0639

R. VOIGHT SHEALY  
MATERIALS MANAGEMENT OFFICER

TO: State Agency

FROM: Georgia Gillens, CPPB, Procurement Manager

Re: Requisition # \_\_\_\_\_

DATE: February 2, 2004

Pursuant to the appropriate sections of The South Carolina Consolidated Procurement Code and ensuing regulations, Requisition # \_\_\_\_\_ is being returned to you for the reasons indicated below. Please complete the required forms and resubmit a complete package to the Materials Management Office for processing. The forms which can be filled in electronically, can be found by visiting the following website <http://www.state.sc.us/mmo/mmo/pubform.htm>


- ☐ Requisition
- ☐ Estimated Cost & Total Cost
- ☐ Proper Signatures (Requestor and Approver)
- ☐ Detailed Specifications Submitted Electronically
- ☐ Justification Prior to Use of a Multi-term Contract (11-35-2030 (2) and 19-445-2135 D (1) (2))
- ☐ Suggested Contract Dates
- ☐ Justification for Competitive Sealed Proposal (RFP) (11-35-1530 (1))
- ☐ Justification for Competitive Best Value Bid (BVB) (11-35-1528 (1))
- ☐ Justification for Fixed Priced Bid (11-35-1525 (1))
- ☐ Suggested Vendor List
- ☐ Agency Buyer and Contact Information

## Bid Opening Information

**NOTICE:** The documents available on this web page are in Portable Document Format ("PDF"). To view or print a PDF file, Adobe Acrobat Reader (a free software program which you may already have) must be installed on your computer. To download Adobe Acrobat Reader and learn how to install it, click on the icon below.

**05-S6744**Posted:  
4:14 PM - 1/11/05

Water Treatment for Winthrop University

- First bullet
- Second bullet
-  PDF File - [Link Text](#)

[Go Back](#)Last Update: 01.11.2005  
Today: 02.01.2005  
Web Page [Comments](#)

Developed By

**Unique Visits: 6**

Georgia Gillens - Re: Reminder : Bid Tab Disclaimer
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Page 1
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**From:** Keith McCook  
**To:** Gillens, Georgia  
**Date:** 2/1/2005 3:11:52 PM  
**Subject:** Re: Reminder : Bid Tab Disclaimer

Draft for Discussion:

Notice:

Section 11-35-1524 provides certain preferences, including preferences for resident vendors and in-state end products. The application of these preferences may determine which vendor is the low bidder. This document does not reflect any impact that may result from the application of these preferences. In addition, this document does not yet reflect the elimination of any vendors as either nonresponsive or nonresponsible.

>>> Georgia Gillens 2/1/2005 2:45:03 PM >>>

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 Fax (803) 737-0639

R. VOIGHT SHEALY  
 MATERIALS MANAGEMENT OFFICER

TO: Marilyn Pietraschke, Procurement Officer

FROM: Georgia Gillens, CPPB, Procurement Manager

SUBJECT: Agency Review of Solicitation #05-S6639, Pest Control Services for Greenville Technical College

DATE: August 30, 2004

Copies of the tabulation sheet and bids are attached for your review and recommendation. If any bid other than the apparent low bidder is being recommended for award, you must furnish clear and convincing written justification why the bid or bids lower than the one you recommend are to be considered for rejection. The final decision remains with the Materials Management Office. Use the reverse of this form or a separate sheet for your review and comments. Please keep copies of the bids and bid tabulation for your records.

Any questions concerning a bid, including specifications are to be directed to the buyer for clarification or resolution. Direct contact with a bidder is not to be done without the buyers' concurrence. Any inquiries from bidders or interested parties outside your agency should also be directed to the buyer. Do not discuss or divulge your findings except to the Materials Management Office.

Due to the limited acceptance period, please return your recommendation no later than ten (10) days from the above date. If any extension beyond that date is needed, please notify the buyer. IF A RESPONSE OR EXTENSION IS NOT RECEIVED IN 7 DAYS OR BEFORE THE EXTENSION TIME, THE MATERIALS MANAGEMENT OFFICE WILL MAKE THE AWARD TO THE LOWEST RESPONSIBLE BIDDER.

IMPORTANT NOTE: Do not reveal or discuss information in this bid with any vendor, as this will forfeit our right of confidentiality under the Freedom of Information Act. If you have any questions or need additional information, I can be reached by phone @ (803) 737-0615 or e-mail [ggillens@mmo.state.sc.us](mailto:ggillens@mmo.state.sc.us).

Georgia Gillens, CPPB

Please visit our website at [www.state.sc.us/mmo/mmo](http://www.state.sc.us/mmo/mmo)

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R. VOIGHT SHEALY  
MATERIALS MANAGEMENT OFFICER

March 24, 2004

Mr. Rick Easler  
American Elevator Company  
975 Bacons Bridge Road, Suite 148 PMB 313  
Summerville SC 29485

Re: IFB Number 04-S6437 – Elevator maintenance and Repair for SCESC Charleston Office

Dear Mr. Easler

Your firm submitted a bid for elevator maintenance and repair for SCESC Charleston Office. As such, I am requesting the following information be submitted to me no later than 4:00 p.m. EST, Wednesday, March 31, 2004. This information will be used to make a determination of responsibility as required by the South Carolina Consolidated Procurement Code and its supporting regulations.


1. Company history, qualifications, and experience in performing security guard services. Indicate the number of years your company has been in the business of providing services such as those outlined in this solicitation. Include a minimum of three (3) references the State may contact to include account name, contact person, telephone number, address and length and nature of contract. Include any other information that would substantiate your experience and qualifications to provide these services.
2. Proof of financial stability and financial resources to perform this contract. Include a copy of your latest financial statement and/or any other information/documentation to substantiate that you have the financial ability to perform this contract.
3. Documentation to substantiate that your firm is registered with either the South Carolina Secretary of State or the South Carolina Department of Revenue.

American Elevator Company  
March 24, 2004  
Page 2

4. Does American Elevator Company currently hold or, has it held in the past, any contract(s) with governmental bodies? If so, please provide us information on whether any of these contracts has ever been terminated for default. Include the name of the governmental body, type of contract, and the reason for termination.

If you have any questions or need further information please do not hesitate to contact me at (803) 737-0615, or by email at [ggillens@mimo.state.sc.us](mailto:ggillens@mimo.state.sc.us).

Sincerely,



Georgia Gillens, CPPB  
Procurement Manager

Cc: Mr. Rick Easler (also via fax)  
(843) 875-5323

**JUSTIFICATION FOR  
BRAND NAME SPECIFICATION**

The agency understands that a "Brand Name" specification is the least preferred type to be used in state procurements. It limits responses to include **only** the make and model products specified. Potentially equivalent products are not considered for award. The agency offers the following justifications:

**NOTE: Explanations will be provided for each brand name specification submitted. The products may be grouped when the explanation is the same for several products. The term "All" can be used if the same explanation applies to all items.**

1. The agency cannot identify the salient characteristics of the products to be procured because it lacks sufficient:

Time: (explain)

Expertise: (explain)

Continued

2. The agency needs to standardize its inventory for:

Maintenance: (explain)

Compatibility: (explain)

The agency further certifies that it is not aware that the products specified qualify as sole sources. It believes that there are or may be multiple vendors that can offer a price on the makes and models specified.

\_\_\_\_\_  
DATE

\_\_\_\_\_  
GOVERNMENTAL BODY

\_\_\_\_\_  
AUTHORIZED REP.'S PRINTED NAME

\_\_\_\_\_  
AUTHORIZED REP.'S SIGNATURE

\_\_\_\_\_  
MMO APPROVAL SIGNATURE

\_\_\_\_\_  
TITLE

<Form>mmo#139

3/14/02



**JUSTIFICATION FOR  
COMPETITIVE SEALED PROPOSAL**

Based upon the following justification, the proposed procurement action described below is being procured pursuant to the authority of Section 11-35-1530(1) of the South Carolina Consolidated Procurement Code.

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DATE

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GOVERNMENTAL BODY

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SIGNATURE

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APPROVED

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TITLE

Distribution: Original retained in governmental body contract file.

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**JUSTIFICATION FOR  
COMPETITIVE FIXED PRICE BIDDING**

Based upon the following justification, the proposed procurement action described below is being procured pursuant to the authority of Section 11-35-1525(1) of the South Carolina Consolidated Procurement Code.

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DATE

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GOVERNMENTAL BODY

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SIGNATURE

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APPROVED

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TITLE

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**JUSTIFICATION FOR  
COMPETITIVE BEST VALUE BIDDING**

Based upon the following justification, the proposed procurement action described below is being procured pursuant to the authority of Section 11-35-1528(1) of the South Carolina Consolidated Procurement Code.

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DATE

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SIGNATURE

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APPROVED

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TITLE

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**JUSTIFICATION FOR  
DETERMINATION OF NONRESPONSIBILITY**

Based upon the State's standards of responsibility, the following determination concerning bidder or offeror capability to meet the terms of the contract as described below is being made pursuant to the authority of Section 11-35-1810(2) of the South Carolina Consolidated Procurement Code.

( 1 )

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(2)

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DATE

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GOVERNMENTAL BODY

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SIGNATURE

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TITLE

Notes: (1) Enter name and address of firm being considered nonresponsible.  
(2) Enter determination of nonresponsibility

Distribution: Original copy retained in contract file. Carbon copy furnished to nonresponsible bidder or offeror.

< f o r m s > m m o # 1 0 5

